CAS2Net and CCAS Open Forum
Thursday
12 Oct 2023
1:00 PM Eastern Time

Topic: Lock/Unlock Supervisor 1, Sub-Pay Pool and Pay Pool

To join this Microsoft Teams Open Forum on your computer, mobile app or room device
Copy and paste the following to join the meeting
https://teams.microsoft.com/l/meetup-join/19%3ameeting_NzQwY2I3MTktZmI1YS00YWM0LThhY2YtMDI4MDA3ZDIzNGMw%40thread.v2/0?context=%7b%22Tid%22%3a%221c21be44-2435-49bf-bc1f-cba317187058%22%2c%22Oid%22%3a%22ad5815de-5095-4600-8a86-0164be9d07a8%22%7d
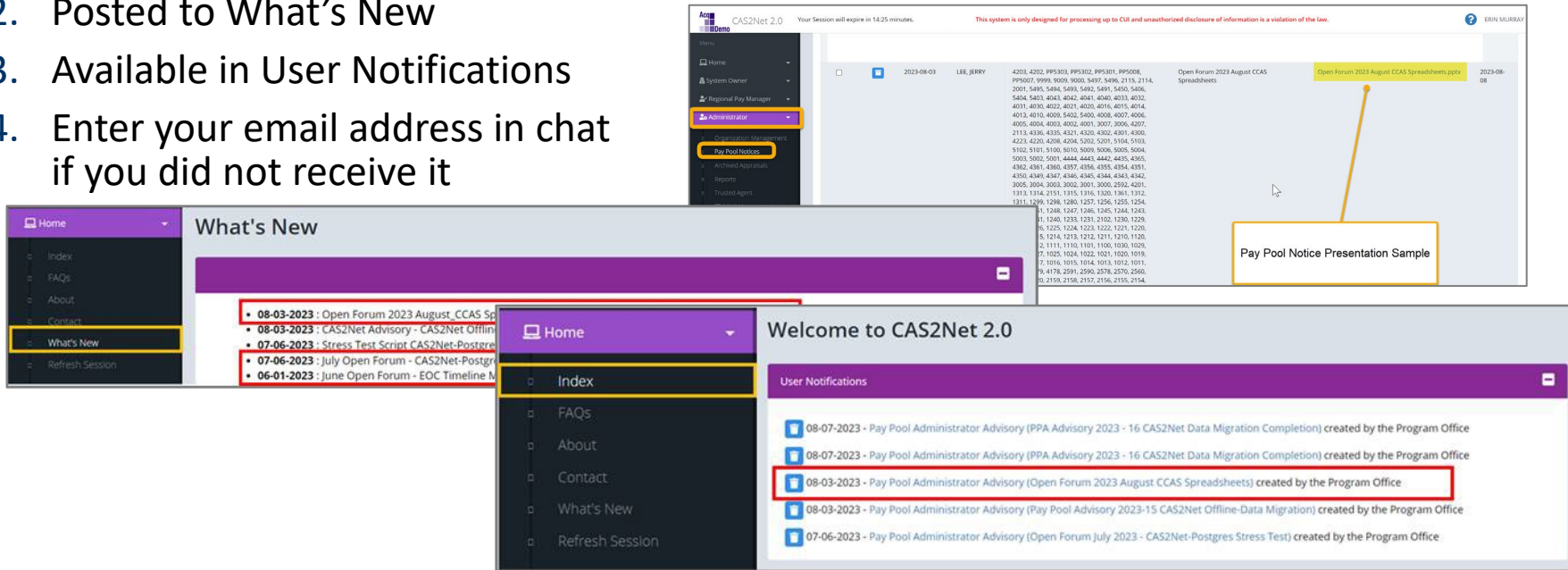
Housekeeping Items

1. Presentations are sent in advance through the CAS2Net Pay Pool Notices

2. Posted to What's New

3. Available in User Notifications

4. Enter your email address in chat if you did not receive it

5. Please remember to "Mute" your phone to prevent any background noise and additional feedback.

6. All Open Forum Sessions will be recorded

7. Each recorded session will be posted to the AcqDemo website (including presentation slides) at
https://acqdemo.hci.mil/training.html#cas2netOpenForums

Just-In-Time AcqDemo 2023 Spreadsheet Training

Basic AcqDemo Spreadsheet Operations

- AcqDemo-wide Course
- ✓ Monday, 2 October 2023 @ 1300 EST
- ✓ Friday, 6 October 2023 @ 0900 EST
- Tuesday, 17 October 2023 @ 1300 EST **(ADDED)**

Advanced AcqDemo CMS Spreadsheet Operations

- AcqDemo-wide Course

- ✓ Friday, 6 October 2023 @ 1300 EST

- Friday, 13 October 2023 @ 0900 EST

- Wednesday, 18 October 2023 @ 1300 EST **(ADDED)**

**If you haven't received the training invitation,
contact Component/Command/Agency Representative(s)

Appraisal Status Module in CAS2Net

- End of cycle CCAS activities are tracked and managed in the Appraisal Status module. Use this module to safeguard the integrity of pay pool results and ensure timely completion of end of cycle activities.

- Key module features:
  - Lock/Unlock before sub panel and/or pay pool panel deliberations to ensure integrity of the pay pool results.
  - "Finalize and Lock Pay Pool" button once pay pool decisions are made by pay pool manager.
  - Release appraisals to Supervisor once the AcqDemo Program Office validates and completes the pay pool process.
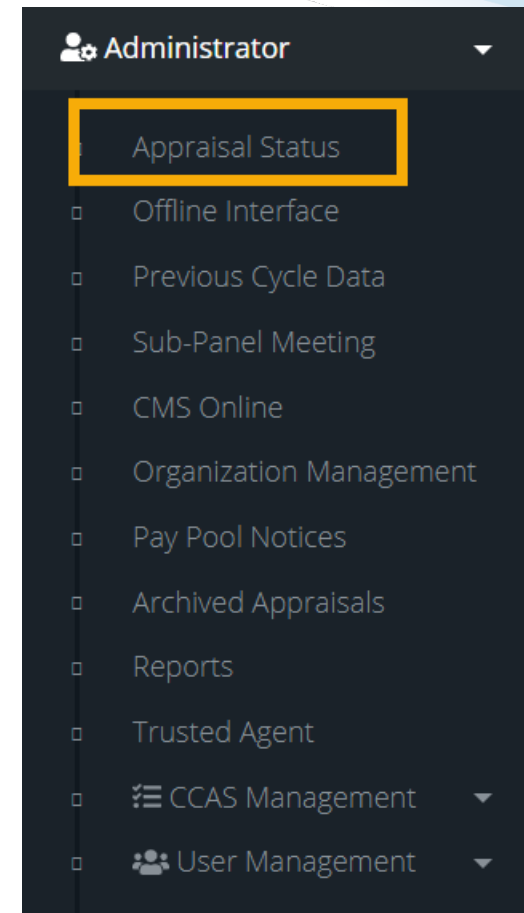
Appraisal Status Module in CAS2Net

- The Appraisal Status module list pay pool and sub pay pool information including:
  - Appraisals started and completed
  - Percentage completed
  - Average Delta OCS
  - Standard (Std) Deviation
  - The ability to lock/unlock CMS Uploads
  - The ability to lock/unlock appraisal scores and narratives

Organization Levels   Reset Data Table ⊖ ▬

Show [10 ▾] entries   Search: [   ]

Organization	Manager	Appraisals Started	Appraisals Complete	Total	Percent Completed	Average Delta OCS	Std Deviation	Lock CMS Uploads	Lock Scores	Lock Narratives
*9009 - 9009 Pay Pool	MANAGER, PAY POOL	31	30	31	96.77%	1.50	5.41		No / Yes	No / Yes
9009-1 - 9009 Sub Panel - Robin	ROBIN, AMERICAN	3	3	3	100.00%	-1.00	1.63	No / Yes	No / Yes	No / Yes
9009-2 - 9009 Sub Panel - Division 2	WOODPECKER, DEWEY	12	12	12	100.00%	2.83	8.20	No / Yes	No / Yes	No / Yes
9009-3 - 9009 Sub Panel - Division 3	SUPERVISOR, ACDP	8	7	8	87.50%	1.29	1.03	No / Yes	No / Yes	No / Yes
9009-4 - 9009-4 Sub-Panel TG	MANAGER, PAY POOL	1	1	1	100.00%	0.00	0.00	No / Yes	No / Yes	No / Yes
9009-HQ - 9009 Sub Panel - HQ		6	6	6	100.00%	0.83	1.21	No / Yes	No / Yes	No / Yes

Showing 1 to 6 of 6 entries   Previous [1] Next

Lock and Unlock Function

- When **BOTH** the scores and narrative are locked at a pay pool, sub pay pool, or supervisor level, all associated annual assessments will be updated to a "Submitted to Pay Pool" status.

  - This will occur regardless of any content entered in for the employee self-assessment and/or supervisory assessment. A prompt will appear confirming the action along with the count of annual assessment(s) impacted by the action. Click Yes to process.

- In the event those same scores and/or narratives are unlocked, the associated assessment(s) will remain in the Submitted to Pay Pool status.

  - The supervisor will, however, have the ability to modify an employee assessment for edits once unlocked.

- For scores and narratives locked at the employee level when unlocked, the annual assessment will be reverted back to the supervisor.

Lock Scores	×
Are you sure you want to Lock Scores?	
	No Yes

Lock Narratives	×
Are you sure you want to Lock Narratives? This will Submit 1 Annual Assessments to the Pay Pool. **This action cannot be undone.**	
	No Yes

Lock and Unlock: Pay Pool Level

To lock/unlock at the pay pool level navigate to the *Organization Levels* panel. The first row in the table represents appraisal status for your current pay pool.

- **To lock/unlock scores:**
  - navigate to the Lock Scores column and select Yes on the associated toggle to lock scores.
  - navigate to the Lock Scores column and select No on the associated toggle to unlock scores.

- **To lock/unlock narratives:**
  - navigate to the Lock Narratives column and select Yes on the associated toggle to lock narratives.
  - navigate to the Lock Narratives column and select No on the associated toggle to unlock narratives.

Organization	Manager	Appraisals Started	Appraisals Complete	Total	Percent Completed	Average Delta OCS	Std Deviation	Lock CMS Uploads	Lock Scores	Lock Narratives
*9009 - 9009 Pay Pool	MANAGER, PAY POOL	31	30	31	96.77%	1.50	5.41		No Yes	No Yes
9009-1 - 9009 Sub Panel - Robin	ROBIN, AMERICAN	3	3	3	100.00%	-1.00	1.63	No Yes	No Yes	No Yes
9009-2 - 9009 Sub Panel - Division 2	WOODPECKER, DEWEY	12	12	12	100.00%	2.83	8.20	No Yes	No Yes	No Yes
9009-3 - 9009 Sub Panel - Division 3	SUPERVISOR, ACDP	8	7	8	87.50%	1.29	1.03	No Yes	No Yes	No Yes

Note: A pay pool number/organization name that begins with "*" in the table do not expand or redirect you to another page when selected.

Lock and Unlock: Pay Pool

The toggle to Lock/Unlock scores and/or narratives at the pay pool level will also apply that same action at the sub pay pool and supervisor 1 levels.

Lock and Unlock Pay Pool: Sub Pay Pool

To lock/unlock at the sub pay pool in the *Organization Levels* panel navigate to the desired sub pay pool from the table.

- **To lock/unlock scores:**
  - navigate to the Lock Scores column and select Yes on the associated toggle to lock scores.
  - navigate to the Lock Scores column and select No on the associated toggle to unlock scores.
- **To lock/unlock narratives:**
  - navigate to the Lock Narratives column and select Yes on the associated toggle to lock narratives.
  - navigate to the Lock Narratives column and select No on the associated toggle to unlock narratives.

Lock and Unlock Pay Pool: Supervisor 1 (Method 1)

To lock/unlock at the supervisor 1 level scroll to the *Supervisors* panel located under the *Organization Levels Panel* then navigate to the desired supervisor from the table.

- **To <u>lock/unlock scores:</u>**
  - navigate to the Lock Scores column and select Yes on the associated toggle to lock scores.
  - navigate to the Lock Scores column and select No on the associated toggle to unlock scores.
- **To <u>lock/unlock narratives:</u>**
  - navigate to the Lock Narratives column and select Yes on the associated toggle to lock narratives.
  - navigate to the Lock Narratives column and select No on the associated toggle to unlock narratives.

At the pay pool level, the Supervisor 1 Panel has the list
of supervisors coded to that pay pool.

Lock and Unlock Pay Pool: Supervisor 1 (Method 2)

To lock/unlock at the supervisor 1 level navigate to the *Organization Levels* panel and select the desired sub pay pool from the table. Then scroll to the *Supervisors* panel located under the *Organization Levels Panel* and navigate to the desired supervisor.

- **To lock/unlock scores:**
  - navigate to the Lock Scores column and select Yes on the associated toggle to lock scores.
  - navigate to the Lock Scores column and select No on the associated toggle to unlock scores.
- **To lock/unlock narratives:**
  - navigate to the Lock Narratives column and select Yes on the associated toggle to lock narratives.
  - navigate to the Lock Narratives column and select No on the associated toggle to unlock narratives.

At the sub pay pool level, the Supervisor 1 Panel has the list of supervisors coded to that sub pay pool.

Lock and Unlock Pay Pool: Employee (Method 1)

To lock/unlock at the employee level navigate to the *Supervisors* panel. Select the desired supervisor from the table. In the *Employees for…* panel navigate to the desired employee. This will lock that supervisor for everyone rated by the supervisor in the pay pool

- **To <u>lock/unlock scores:</u>**
  - navigate to the Lock Scores column and select Yes on the associated toggle to lock scores.
  - navigate to the Lock Scores column and select No on the associated toggle to unlock scores.
- **To <u>lock/unlock narratives:</u>**
  - navigate to the Lock Narratives column and select Yes on the associated toggle to lock narratives.
  - navigate to the Lock Narratives column and select No on the associated toggle to unlock narratives.
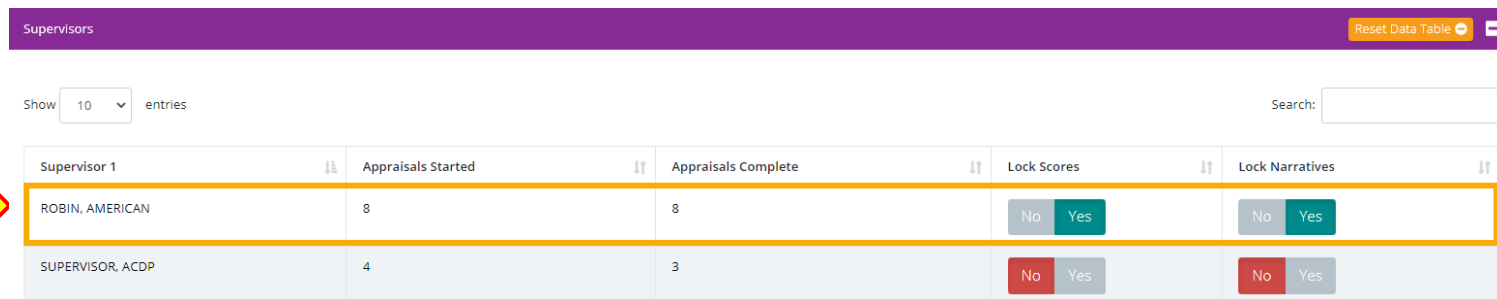
Select →

Employees for AMERICAN ROBIN in 9009 - 9009 Pay Pool

Show 100 entries   Search:

Employee	Organization	Status	ROR	Prev OCS	Curr OCS	EOCS	Job Achievement and/or Innovation	Communication and/or Teamwork	Mission Support	Lock Scores	Lock Narratives
BIRD, BLU	9009-HQ - 9009 Sub Panel - HQ	Submitted to Pay Pool	3	82	79	79				No / Yes	No / Yes
BUNTING, INDIGO	9009-2 - 9009 Sub Panel - Division 2	Submitted to Pay Pool	1	N/A	54	53	53	57	53	No / Yes	No / Yes
FINCH, GOLD	9009-1 - 9009 Sub Panel - Robin	Submitted to Pay Pool	5	80	80	N/A				No / Yes	No / Yes
GRACKLE, COMMON	9009 - 9009 Pay Pool	Submitted to Pay Pool	3	84	83	83	83	83	83	No / Yes	No / Yes

Lock and Unlock Pay Pool: Employee (Method 2)

To lock/unlock at the employee level navigate to the *Organization Levels* panel and select the desired sub pay pool from the table. Then scroll to the *Supervisors* panel located under the *Organization Levels Panel* and select the desired supervisor from the table. In the *Employees for…* panel navigate to the desired employee. This will lock that supervisor for everyone rated by the supervisor in the that sub-panel.

To lock/unlock scores:

- navigate to the Lock Scores column and select Yes on the associated toggle to lock scores.
- navigate to the Lock Scores column and select No on the associated toggle to unlock scores.

- **To lock/unlock narratives:**

- navigate to the Lock Narratives column and select Yes on the associated toggle to lock narratives.
- navigate to the Lock Narratives column and select No on the associated toggle to unlock narratives.

Lock CMS Uploads

Lock and Unlock: CMS Upload

- Go to Menu > Administrator > Appraisal Status
- In the *Organization Levels panel* navigate to the desired sub pay pool from the table. Under the Lock CMS Upload column:
  - select Yes on the associated toggle to lock CMS upload.
  - select No on the associated toggle to unlock CMS upload.
- Recommend locking CMS Uploads before pay pool panel meeting(s) begin.

Finalize and Lock Pay Pool

How to Finalize and Lock a Pay Pool

- Go to Menu > Administrator > Appraisal Status
- Click Finalize and Lock Pay Pool
- **Administrators will not be able to finalize until the 2024 GPI and locality area pay rates are published by OPM**

How to Finalize and Lock a Pay Pool

In the Lock Pay Pool pop-up, click **Yes**

Lock Pay Pool   ×

Are you sure want to lock the pay pool not allowing further CMS uploads?

No   Yes

Pay Pool Appraisal Status is Locked(Note **Unlock Finalized Pay Pool ◐**)

Appraisal Status for 9009 - 9009 Pay Pool (Locked)   PMO > AcqDemo > 9009

General Information   ⊟

Fiscal Year

2023 ▾

Organization Levels   Unlock Finalized Pay Pool ◐   Reset Data Table ⊖   ⊟

How to Unlock a Finalized Pay Pool

To Unlock a finalized pay pool, click **Unlock Finalized Pay Pool** ←

Unlock Pay Pool   ×

Are you sure want to unlock the pay pool allowing CMS uploads?

No   Yes

Yes

Appraisal Status for 9009 - 9009 Pay Pool

PMO > AcqDemo > 9009

General Information ▬

Fiscal Year

2023 ▾

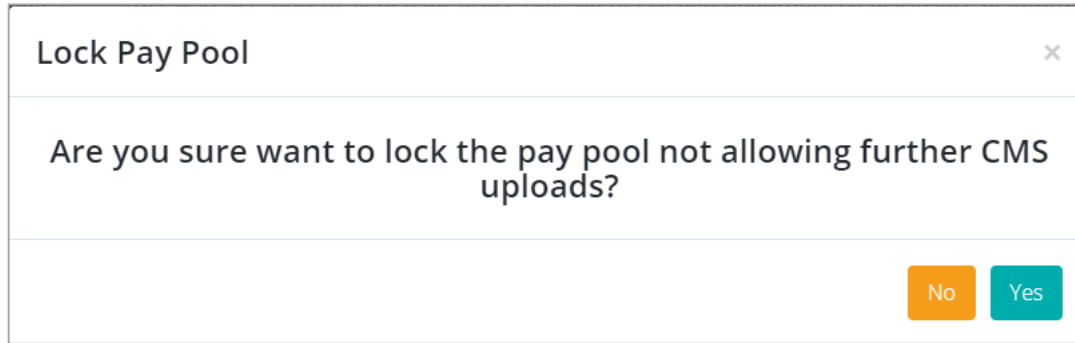**Organization Levels**   Finalize and Lock Pay Pool ➡   Reset Data Table ➖ ▬

Administrators can only unlock previously locked pay pool or sub panel as long as the component/command hasn't locked the component/command pay pools or the AcqDemo Program Office hasn't already validated the pay pools.

Just-In-Time AcqDemo 2023 Spreadsheet Training

Basic AcqDemo Spreadsheet Operations

- AcqDemo-wide Course
- ✓ Monday, 2 October 2023 @ 1300 EST
- ✓ Friday, 6 October 2023 @ 0900 EST
- Tuesday, 17 October 2023 @ 1300 EST **(ADDED)**

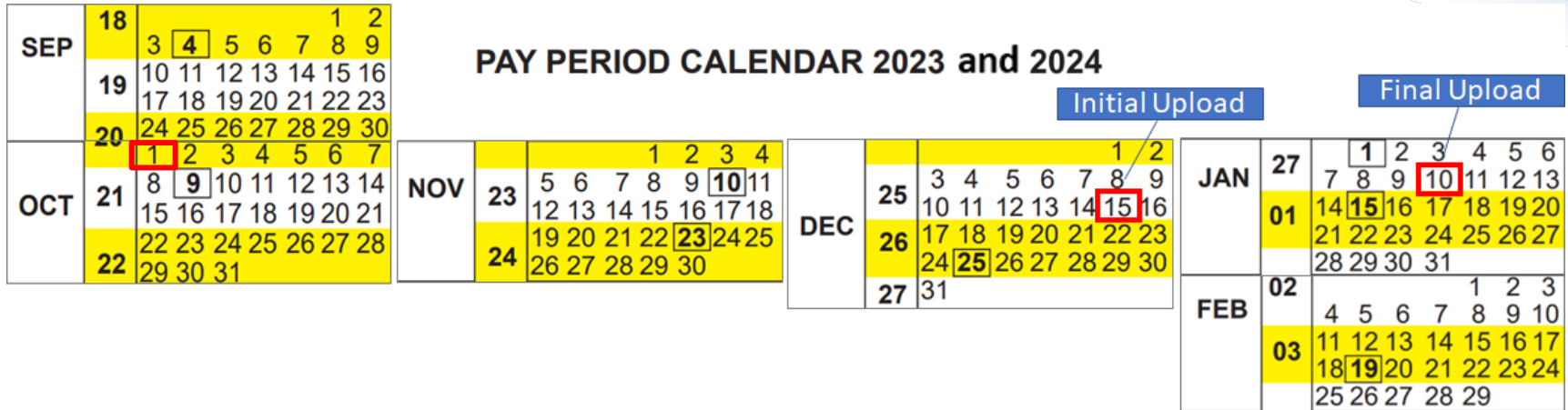**Advanced AcqDemo CMS Spreadsheet Operations**

- AcqDemo-wide Course
- ✓ Friday, 6 October 2023 @ 1300 EST
- – Friday, 13 October 2023 @ 0900 EST
- – Wednesday, 18 October 2023 @ 1300 EST **(ADDED)**

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End of Cycle Key Dates

PAY PERIOD CALENDAR 2023 and 2024

	2023 End of Cycle Timeline		
	Date	Event	Action By
Sunday	1-Oct-23	Activate CAS2Net End of Cycle Process Modules (Appraisal Status, Offline Interface, Previous Cycle Data, Sub-Panel Meeting, and CMS Online)	PMO
Sunday	1-Oct-23	Post Sub-panel Meeting Spreadsheet (SPMS), Compensation Management Spreadsheet (CMS) and Pay Pool Analysis Tool (PAT) to CAS2Net Pay Pool Notices	PMO
Friday	**15-Dec-23**	**Initial upload so AcqDemo Program Office can check CMS parameters** **Subject to Component or Command Initial Upload Date**	**Pay Pool Administrators**
Wednesday	**10-Jan-24**	**Pay pools finalize upload** **Subject to Component or Command Initial Upload Date**	**Pay Pool Administrators**
Sunday	**14-Jan-24**	**Beginning date of the first full pay period in January – Effective date of CCAS payouts (ratings effective 1 Jan 2024)**	
Friday-Saturday	19-20 Jan 24	CAS2Net upload pay and rating transaction files to regional pay offices	PMO

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2023 Open Forum Schedule

- ✓ 05 January, 1pm – 2:30pm ET: Pay Transactions and Turning CAS2Net Data Base
- ✓ 02 February, 1pm – 2:30pm ET: CCAS Grievance and Archived/Transfer
- ✓ 02 March, 1pm – 2:30pm ET: Assigning Mandatory Objectives, Midpoint Assessment/Review, Additional Feedback, and Closeout Assessment
- ✓ 06 April, 1pm – 2:30pm ET: ACDP Assessments and Communicating with AcqDemo Program Office on CAS2Net and CCAS Issues
- ✓ 04 May, 1pm – 2:30pm ET: Reports – FY-based Reports & Current Settings Reports
- ✓ 01 June, 1pm – 2:30pm ET: Macro Free ~~Sub Panel Spreadsheet and~~ Compensation Management Spreadsheet (CMS) Introduction
- ✓ 06 July, 1pm – 2:30pm ET: ~~Creating Sub-Organization Levels and Assigning Sub-Panel Managers, and User Role Assignments and/or~~ CAS2Net Performance Test
- ✓ 03 August, 1pm – 2:30pm ET: CCAS Spreadsheet Test Schedule (Offline Sub-Panel Meeting Spreadsheet, Offline CMS, Macro Free versions, and CAS2Net Online versions)
- ✓ 07 September, 1pm – 2:30pm ET: End of Cycle Modules (Appraisal Status, Offline Interface, Previous Cycle Data) and Transfer, Archive and Post Cycle Activities
- • ~~14 September, 1pm – 2:30pm ET: Sub-Panel Meeting Online and CMS Online~~
- ✓ 21 September, 1pm-2:30pm ET: Macro-enabled Sub-Panel Meeting Spreadsheet and CMS
- ✓ 28 September, 1pm-2:30pm ET: CAS2Net Sub-Panel Meeting and CMS Online
- ✓ 05 October, 1pm-2:30pm ET: Discrepancy Reports
- ✓ **12 October, 1pm-2:30pm ET: Lock/Unlock Supervisor 1, Sub-Pay Pool and Pay Pool**
- • **19 October, 1pm-2:30pm ET: Pay Pool Analysis Tool (PAT)**
- • 02 November, 1pm-2:30pm ET: Initial and Final Upload
- • 16 November, 1pm-2:30pm ET: Not Final Reports and Data Complete Reports
- • 07 December, 1pm-2:30pm ET: Grievance/Grievance Window
- • 04 Jan 2024, 1pm-2:30pm ET: CCAS Pay Transactions for Regional Pay Offices

Open Forum Questions?

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